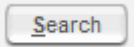
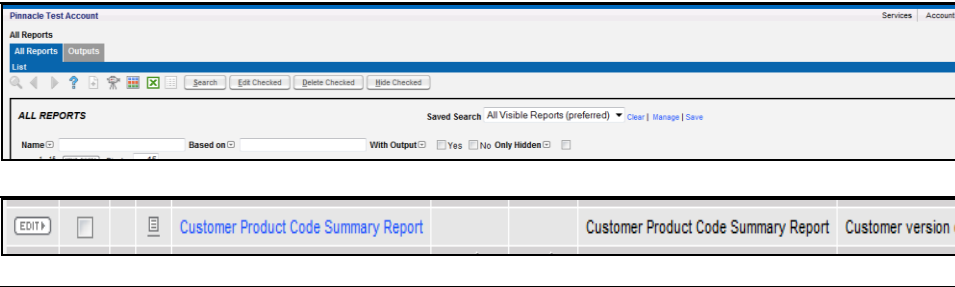


Reports: Customer Product Code Summary Report

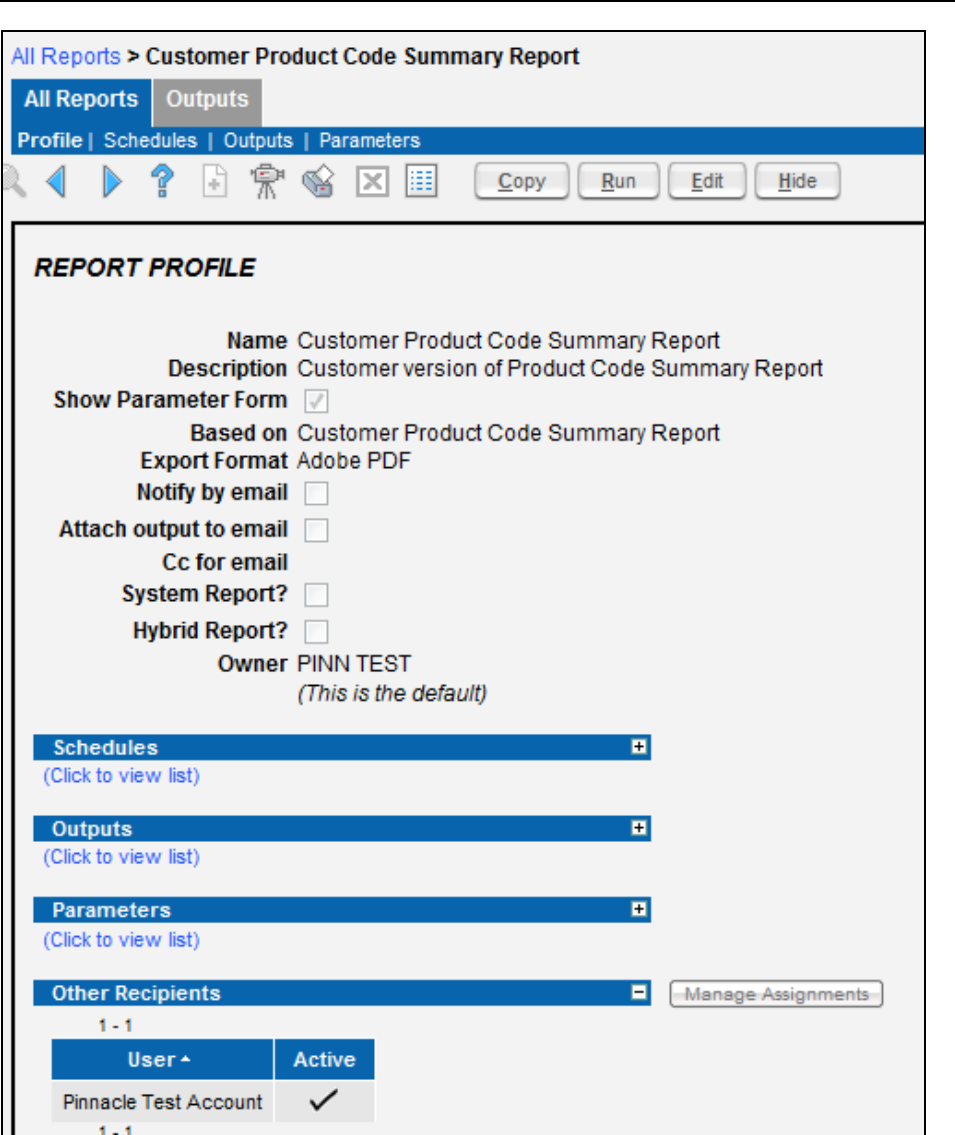
Product Code Summary Report: Billed Services by BU-Department, by Product Code for a specified Billing month.
Refer to Product Code Detail Report for specific Service Numbers and User Names.

1. Open **Reports** Main Menu.
- Click 
- 2.Click on the blue highlighted Name: Customer Product Code Summary Report



The screenshot shows the 'Pinnacle Test Account' interface. At the top, there are tabs for 'All Reports' and 'Outputs'. Below these is a search bar and several filter buttons: 'List', 'Search', 'Edit Checked', 'Delete Checked', and 'Hide Checked'. A section titled 'ALL REPORTS' contains a 'Name' field and a 'Based on' dropdown. To the right, there are checkboxes for 'With Output', 'Yes', 'No', and 'Only Hidden'. At the bottom, a table lists reports, with 'Customer Product Code Summary Report' highlighted in blue.

3. Opens Report Profile
- Now Click 



The screenshot shows the 'All Reports > Customer Product Code Summary Report' profile. It has tabs for 'All Reports', 'Outputs', 'Profile', 'Schedules', 'Outputs', and 'Parameters'. Below the tabs is a toolbar with icons for navigation and actions like 'Copy', 'Run', 'Edit', and 'Hide'. The main section is titled 'REPORT PROFILE' and contains the following details:

- Name:** Customer Product Code Summary Report
- Description:** Customer version of Product Code Summary Report
- Show Parameter Form:** ☒
- Based on:** Customer Product Code Summary Report
- Export Format:** Adobe PDF
- Notify by email:** ☐
- Attach output to email:** ☐
- Cc for email:**
- System Report?:** ☐
- Hybrid Report?:** ☐
- Owner:** PINN TEST (This is the default)

Below the profile details are expandable sections for 'Schedules', 'Outputs', 'Parameters', and 'Other Recipients', each with a '+' icon and a link to 'view list'. The 'Other Recipients' section is currently expanded, showing a table with one user: 'Pinnacle Test Account'.

User	Active
Pinnacle Test Account	<input checked="" type="checkbox"/>

Reports: Customer Product Code Summary Report

4. Opens Report Parameters.

Key in your **Output Name**

Note: This name will show up on the Output List Page.

Choose **Output Format** from dropdown list.

Click on Dropdown for **Business Unit** OR
Choose from Departments under **Select Users**

Caution: If both Business Unit and Users are picked for report, report will default to entire Business Unit.

Choose **Starting Bill Period** from dropdown.
Also Click **Ending Bill Period** from dropdown. (Must be the same)

Select Product Codes, Click [Manage Assignments](#)

Report Parameters

Report Name: Customer Product Code Summary Report Output Name: Output Format: Adobe PDF ▼

Save these settings ☐ Don't show me this again ☐

Notify by email ☐ Attach output to email ☐ Cc for email

Business Unit: 00510 ▼

Select User(s): [Manage Assignments](#)

Select Starting Bill Period *: April, 2013 ▼

Select Ending Bill Period *: April, 2013 ▼

Select Product Code(s): *ALL* [Manage Assignments](#)

5. Opens Manage Assignments.

Click Name in Unassigned column and click to assign Product Code Name(s) to your report.

OR

Highlight *All* to move All Product Lines from Unassigned to Assigned.

Select code or Name and click if you have code or description.

*CAUTION: If you click [Select All](#), you will only highlight the 15 items on the page shown, NOT the entire list. Use *All* if you want all Products Assigned.*

Product Code

Code

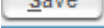
Assigned [Select All](#)

Code	Name
ALL	All Product Codes
1001	SEAT SERVICES
1001A	PC REFRESH ACCESSORIES
1001D	BMV SEAT
1001U	PC REFRESH UPGRADES
1001UC	SEAT USAGE CREDIT
1014	EMAIL NNS
1020	CITRIX
1021	REMOTE ACCESS: CLIENT VPN
1022	REMOTE SERVICES: DIAL-UP
1023	EXTRANET FTP SERVICES
1025	SHARED WEB HOSTING
1027	BLACKBERRY SERVICES
1028	BLACKBERRY SERVICES
1031	AUTOMATIC CALL DISTRIBUTION

1 - 15 (NEXT PAGE)

Reports: Customer Product Code Summary Report

6. In this example, we will be going to assign All Product Codes.

When you are finished, Click  !

Product Code

Search Save Cancel Assign All Deassign All

Code

Assigned

Code	Name
ALL	All Product Codes

1 - 1

Unassigned

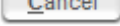
Code	Name
1001	SEAT SERVICES
1001A	PC REFRESH ACCESSORIES
1001D	BMV SEAT
1001U	PC REFRESH UPGRADES
1001UC	SEAT USAGE CREDIT
1014	EMAIL NNS
1020	CITRIX
1021	REMOTE ACCESS: CLIENT VPN
1022	REMOTE SERVICES: DIAL-UP
1023	EXTRANET FTP SERVICES
1025	SHARED WEB HOSTING

1 - 15 (NEXT PAGE)

7. Report Parameters are set.

Now click .

Note: If you change your mind about the Report

Parameters, click  and return to previous page. Start over.

Report Parameters

Report Name Customer Product Code Summary Report Output Name April 2013 Output Format Adobe PDF

Save these settings ☐ Don't show me this again ☐

Notify by email ☐ Attach output to email ☐ Cc for email

Business Unit 00510

-Or-

Select User(s)

Select Starting Bill Period * April, 2013

Select Ending Bill Period * April, 2013

Select Product Code(s) *ALL*

8. Status Report

PINNACLE - Waiting for Report - Windows Internet Explorer

WAITING FOR REPORT

Output Name Customer Product Code Summary Report
Report Name Customer Product Code Summary Report
Processing.....

Reports: Customer Product Code Summary Report

9. Report Output in Adobe PDF format...

Business Unit
Service Type
Product code
Product Code Description
Units & dollars.
Total for each Service Type

PS_SYSTEM[6].pdf - Adobe Acrobat Pro

File Edit View Window Help

Create [Icons] Customize [Icons]

1 / 2 64.7%

Tools Sign Comment

Report Name: Product Code Summary				
Run Date: 9-Jun-2013				
Business Unit: 00510 - Department of Workforce Development			Billing Periods: From: April 2013 To: April 2013	
Services by Product Codes:				
Service Type	Product Code	Description	Units	Total
800 Services	1038	800 Switched	364.7000	\$10.94
	1039	800 Dedicated	322618.1167	\$6,801.99
	1107	Long Distance Dedicated	10803.4000	\$227.10
	1108	NON CONTRACTED LONG DISTANCE	34.0000	\$18.70
			User 800 Services Total:	\$7,058.73
Centrex Services	1031	AUTOMATIC CALL DISTRIBUTION	60.0000	\$1,046.70
	1036	Directory Assisted	2.0000	\$3.98
	1037	Long Distance Switched	5.1167	\$0.16
	1043	TELEPHONE CENTREX	704.0000	\$10,606.27
	1044	TELEPHONE REMOTE	110.0000	\$141.21
	1107	Long Distance Dedicated	74563.8000	\$1,568.24
	1108	Toll	2762.5333	\$139.50
	1163	Technician Labor	9.0000	\$146.25
			User Centrex Services Total:	\$13,652.31
ISDN PRI Services	1044	TELEPHONE REMOTE	13.0000	\$5,750.47
			User ISDN PRI Services Total:	\$5,750.47
IT Services	1001	SEAT SERVICES	1794.0000	\$139,752.60
	1001A	PC REFRESH ACCESSORIES	4.0000	\$644.85
	1001U	PC REFRESH UPGRADES	3.0000	\$4,416.00
	1020	CITRIX	406.0000	\$2,602.46
	1021	REMOTE ACCESS: CLIENT VPN	206.0000	\$197.76
	1023	EXTRANET FTP SERVICES	1.0000	\$19.90
	1034	COMMUNICATION SERVICE ANALYST	3.0000	\$183.15
	1050	PHYSICAL SERVER HOSTING	148.0000	\$26,274.44
	1052	VIRTUAL SERVER HOSTING	37.0000	\$3,050.65
	1052A	VM SERVER (1 EXTRA CPU)	45.0000	\$1,237.05
	1052B	VM SERVER (1 EXTRA GB RAM)	187.0000	\$2,569.38
	1052C	VM SERVER (1 EXTRA DISK)	1049.0000	\$860.18
	1056	SHARED SAN STORAGE	32999.0000	\$48,838.52
	1114	DATABASE HOSTING	108.0000	\$6,955.20

10. Report Output is saved in Pinnacle.
Look in Report Profile/Outputs; the most recent Output Name shown. Click on link to open Report Output.

Important:

If you don't have time to wait for the report to be generated, your report output will be available in Outputs.

REPORT PROFILE

Name Customer Product Code Summary Report
Description Customer version of Product Code Summary Report
Show Parameter Form ☒
Based on Customer Product Code Summary Report
Export Format Adobe PDF
Notify by email ☐
Attach output to email ☐
Cc for email ☐
System Report? ☐
Hybrid Report? ☐
Owner PINN TEST
(This is the default)

Schedules

(Click to view list)

Outputs

1 - 8

	Output Name	Run By	Date Run	File Type	Size(KB)
	April 2013	Pinnacle Test Account	06-JUN-2013 05:34PM	pdf	29.3
	Customer Product Code Summary Report	Pinnacle Test Account	06-JUN-2013 08:44AM	pdf	36.4

Finished.

Good job!